CHEAT SHEET TO DELEGATION

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Discover the tasks delegated by the most successful entrepreneurs that you absolutely MUST know to free yourself from business slavery.

Before delegating, you might be pulling your hair out thinking "***where the hell do I start***?"

Delegation comes when you are in a position to scale and are ready for expansion. When this time comes *(which I'm assuming it has - or you wouldn't be here, heh)*, you need to figure out how to **DUPLICATE** yourself.

Follow the *MARTINI FORMULA*

1. MAPPING IT OUT

It's time to sit down and get a pen and paper if you're old fashioned, or use the section below to start writing down *every single activity & process* that you can think of in your business.

Allow enough space under each activity/process to add more later.

Think of these **6 Fundamental Business** Categories when riffing this out:

1. **Marketing**
2. **Sales**
3. **Delivery**
4. **Operations**
5. **Finance**
6. **Team**

Check out **table A** at the bottom of this cheat sheet for some ideas on business processes/activities to include under the 6 fundamentals .

DO THIS

Map out and clearly identify every activity & process in TABLE B "CHEAT SHEET TABLE" below

2. BOX IT UP

The second step to mapping it out is boxing it up! Or, categorizing.

This is where you take a look at everything you've written under the *"Cheat Sheet Table"* and break it further down into; *tasks, subtasks and deliverables.*

Task: This is the main activity under each pillar *i.e., "Finance" you might have "Manage Xero"*

Subtask: This is something more specific within the task, if the 6 fundamentals are the trunk of the tree, the tasks are the branches, then the subtasks are the leaves. i.e. The task of *"Manage Xero"* might have subtasks, *"invoicing clients"* or *"reconcile financials"* or *"Generate profit/loss every fortnight".*

Deliverables: Think of this as a simple instruction on how to complete the subtasks. i.e., the subtask "Invoicing clients" might have "Invoice clients on the 16th and 30th of every month, follow up via email 1 week later if still unpaid" **Deliverables:** Think of this as a simple instruction on how to complete the subtasks. i.e., the subtask "Invoicing clients" might have "Invoice clients on the 16th and 30th of every month, follow up via email 1 week later if still unpaid"

DO THIS

Take a look at the list of activities you've written under each of the 6 Fundamentals in the previous exercise. Now break each single activity down to tasks, subtasks, and deliverables.

TIP: *Contemplate and take your time with this, you'll reap the rewards later when you put extra time into this part*

3. SOP IT

This is the fun part!! This is where you get to give your business a bit of a skeleton, or a *back-bone*, if you will.

Now you have your business processes listed under the 6 fundamentals AND you have your tasks, subtasks and deliverables in each of the columns.

The next part involves writing specific step-by-step details on completing each subtask. So, back to the tree trunk analogy, this part of the analogy is the VEINS on the leaves.

YES, we do need to be that specific. BUT WHY!? Because us entrepreneurs get so stuck in our head and know all these processes ourselves, and we get STUCK on pulling it out of our heads and sticking it somewhere in the tangible world so that we actually have a chance to build a dream team and end the business slavery of doing ALL the things & feeling trapped.

i.e. The description for “Invoice clients on the 16th & 30th of every month” might be:

1. Log in to Xero account and navigate to the “invoice” tab
2. Click on the “customer” tab and select the first client you are going to bill
3. Cross check the bill with our internal management system
4. Enter the amount to be charged next to the client's name and press “send”
5. Rinse and repeat with remaining clients to be billed until complete

Creating SOPs are great, because once you’re ready for your new co-worker, you’re able to send them somewhere to get started which makes for seamless onboarding and training.

3 reasons I LOVE SOP’s

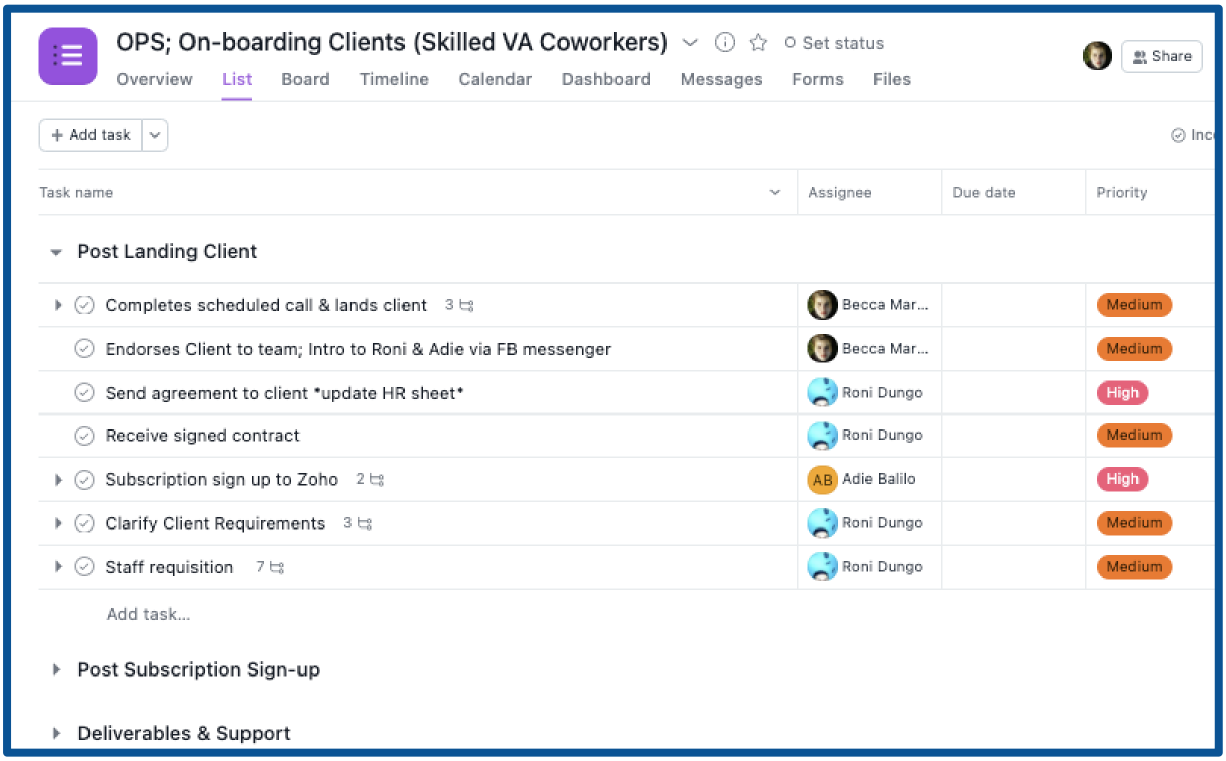
1. **You can promote people easily**, as you can find someone more junior to jump in and fulfill the role the promoted staff member was once doing
2. **You can fire when you need to:** *Fire fast, hire slow* is what my mentor told me. If it’s not working out, it makes it easier to replace.
3. **Your staff have peace of mind:** They are not chained to your business, and can take sick days or go for holidays - yayy! Because you can easily backfill their position with your stellar SOPs!

DO THIS

Review your columns, fundamentals, tasks, subtasks & deliverables. Write clear & concise steps on how to perform them. Include all resources i.e. logins, docs, links, pdfs

TIP: *Upload your new SOPs to ASANA or TRELLO in an organised format for easy onboarding and training.*

Example of how this may look on ***Asana***:



4. TAG AWAY

This is where you tag the importance and urgency of all tasks and subtasks.

Not only will this help you prioritise on your own tasks, as well as where to start outsourcing, but it will also identify exactly where the cashola and profitability is made!

As the CEO or founder of a company, you don't want to be working on the repetitive, medial and low value tasks. This will help determine what needs to either be removed, automated or outsourced.

DO THIS

Put a number for 1-4 (1= lowest value & 4 = highest value next to each subtask)

EXAMPLE:

Fundamental: **Marketing**

Task: **Social Media Management**

- Subtask 1: Scheduling content **(1)**
- Subtask 2: Research trends **(2)**
- Subtask 3: Writing copy **(4)**
- Subtasks 4: Graphic/image marrying **(1)**
- Subtask 5: Monitoring engagement **(2)**
- Subtask 6: Analysis of campaign strategy **(4)**

I tagged two subtasks as **4 (high value),** as the strategy and copy are **directly related** to value and revenue generating activities.

5. FIND THE FIT

The next part is to find the right value-matched virtual assistant for the things you are wanting to outsource by first identifying:

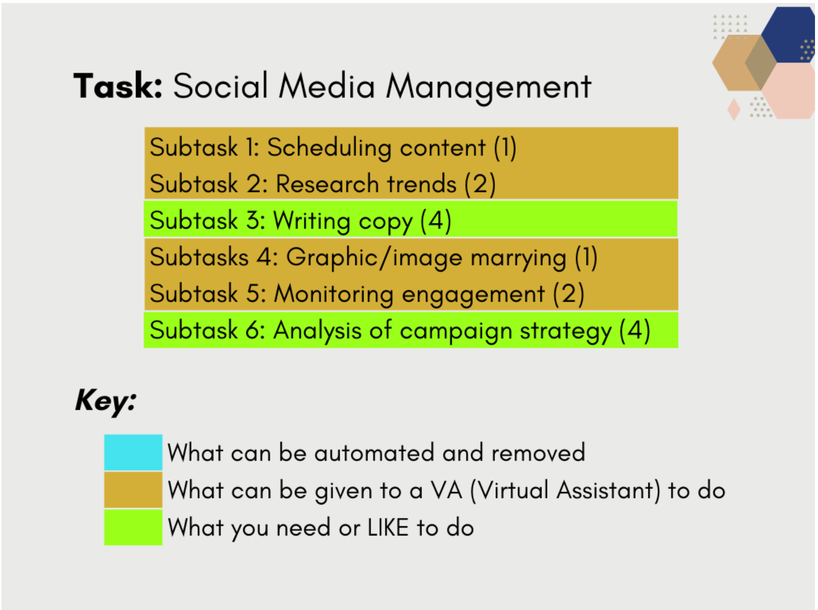
1. What can be automated and removed
2. What can be given to a VA (Virtual Assistant) to do
3. What you need or LIKE to do

Once you know these points, you can then prioritize what needs to be **outsourced first.**

What needs to be outsourced first will depend on **1.) the tagging system**, and **2.) how much is highlighted** for a VA to complete under one SOP.

EXAMPLE:

Fundamental: Marketing



There is a high percentage of highlights + low value tasks here, which would indicate a ***VA social media management role*** would be a good place to start!

DO THIS

Highlight your tasks & subtasks with two different colours based on whether they align with point 1, 2 or 3 above

TIP: *Thinking about what is consuming most of your time right now + low value task + VA task = outsource*

Once you've identified some roles in your company's systems and processes that can be fulfilled by a VA, *it's time to crunch your numbers* and get a **budget** together.

Figure out what you're working with! Marcus Lemonsis says *"If you don't know your numbers, you don't know your business"*

Once you've had a look at your numbers and you have a **budget,** you need to **consider the hours you will be hiring someone for** in an ongoing position - this is very important! Part time would start at 15-20 hours (I wouldn't go any less than this) and FT is 40 hours/week.

The next steps are exciting, getting to the hiring and recruitment!

You need to decide if you want to **go through an agency** who will do the heavy lifting of HR/recruitment, or if **you will be the recruiter/HR yourself.**

Where to from here?

1. Check out this Recruitment Guide I made for the next steps
2. Join our growing community Scaling with Virtual Assistants for exclusive access to our secrets to scaling & building your dream team!
3. Check out our YouTube Channel for all things scaling with VA's - all our tips & tricks, VA & HR hacks, systems, processes & strategies

TABLE A

ADMIN + FINANCE

- Bookkeeping,
- Payroll
- Paying
- Bills
- Transferring
- Funds
- Invoices
- Keep
- QuickBooks Update
- Organize and Pay
- Team Members
- Record
- Monthly Sales
- Tax
- Figures
- Manage your Account software (Xerox, QuickBooks)
- Compile Weekly Financial Updates
- Create Financial Reports
- Work with Accountant for Year-End Taxes
- CRM & automation set-up
- Research
- Email Management
- Create and Manage Documents
- Organize Files (Cloud)
- Schedule Meetings
- Project Management and Training Tasks
- Tracking Deadlines
- Proofread
- Create Document Templates
- Transcription

MARKETING + LEAD GENERATION + SALES

- Research & Compile Email Addresses
- Answer Responses from Lead
- Compile Lists of Industry Leads
- Set Up Mailmerge
- Cold Call Potential Customers
- Advanced LinkedIn Lead Generation
- Email Marketing & campaigns
- Email Management
- Data Mining
- Appointment Setting
- Create Lead Cards

CLIENT SUPPORT + DELIVERY + OTHER OPS

- Customer Service
- Weekly client checkups
- Video Editing
- Newsletter Graphics
- Copywriting & Content Creation (SMM posts, blogs, e-book, website, funnel)
- Website Design
- Social Media Graphics
- Social Media Management
- Scheduling Appointments
- Coach Guide PDF
- Proofreading
- Designing Brochure
- Market Research
- Create Landing Page
- Logos
- SEO
- Resume Creation
- Data Entry
- Producing Graphs
- Presentation/ Slides Creations
- Contract Review
- Filtering support email
- Photo Editing
- Social Media Advertising
- Audio Editing
- Analyze Statistics
- Funnels and Landing page
- Affiliate Marketing
- Personal errands
- Dropshipping

TABLE B

Cheat Sheet Table

MARKETING

Cheat Sheet Table

SALES

Cheat Sheet Table

DELIVERY

Cheat Sheet Table

OPERATIONS

Cheat Sheet Table

FINANCE

Cheat Sheet Table

TEAM